

Free Tax Help!

UNI VITA Free Tax Help

When: February 11th – April 14th
(excluding March 17th – 21st)
Monday's & Wednesday's ONLY

Location: University of Northern Iowa
Curris Business Building
Room 224

Time: 5:00 – 7:00 p.m.

Questions: UNI Department of Accounting
273-2394

UNI Free Tax Preparation Will NOT do:

- Income > \$54,000
- Schedule C
- Sale of business property
- Rental Income
- Prior Year Tax Returns
- Married Filing Separate Returns
- ITIN Returns
- Foreign Tax Credits
- Military
- Complex Returns
- Foreign Scholars

**ONLY IOWA AND MINNESOTA
returns are prepared**

**NOTE: For married filing joint returns, both
spouses must be present**

Documentation Required for U.S. Tax Return

For U.S. Taxpayers and International students

Identification - Valid Photo Identification

Form W-2 - Wage and Tax Statement (Acquire one from each employer)

Forms 1099 - Interest, dividends, and any other miscellaneous income

Social Security Cards - Bring for taxpayer, spouse, and dependents

Form 1098T - Tuition payment statement (from University or My Universe)

Form 1098E - Student loan interest statement

Prior Year Tax Return - a copy of last year's Federal and State tax returns

Banking Information - Checking or savings account information which includes an account number and routing number

List of Additional Income Information - Income from disability, interest, state tax refund, alimony, tip, pension, IRA, unemployment, social security, self employment, gambling, awards, and other sources of income

List of Additional Expense Information - Expenses from IRA, other retirement account, alimony paid (needs social security number of recipient), education, un-reimbursed medical, home mortgage payments, charitable contributions, real estate taxes, and any other sources of expenses

International students should also bring:

Foreign Identification - Includes passport and visas

Form 1042S - Person's U.S. Source Income Subject to Withholding



**Bring these
documents
with you**